Financial Planning & Consulting

Menu of Services

GENESIS
By Resource One Advisors

	Essential	Premier	Executive
Service Standards			
Meeting frequency (virtual or in person)	**Annual**	**Semi-Annual**	**Quarterly**
Client check-in (phone)	1	2	As needed
Turnaround time	1-2 Business Days	1 Business Days	1 Business Day
Accountability Partner	X	X	X
Fiduciary	X	X	X
Client Benefits			
Access to professional financial advice	X	X	X
Online financial organizer	X	X	X
Account aggregation	X	X	X
Secure document storage	X	X	X
Budgeting Tools	X	X	X
Financial education communication	X	X	X
Monthly market updates and insights	X	X	X
Client Appreciation events		X	X
Financial Planning & Consulting			
Investment allocation advice	X	X	X
Portfolio reviews	X	X	X
Financial goal plan check-ups	X	X	X
401k allocation review	X	X	X
Real-time comprehensive financial plan		X	X
Detailed reporting and progress tracking		X	X
Retirement and life transition planning		X	X
Review of employer benefits		X	X
Education planning		X	X
Year-end tax planning		X	X
Personal insurance planning		X	X
Basic estate planning		X	X
Full collaboration with 3rd party professionals		X	X
Executive compensation and stock options			X
Charitable planning techniques			X
Complex trust and estate planning			X
Business succession planning			X
Family wealth planning			X

Ongoing Financial Planning Costs may be included with AUM[1]

	Essential	Premier	Executive
Upfront Payment	**$750**	**$1,500**	**$2,400**
Ongoing Annual Payment[1]	**$600**	**$1,200**	**$1,800**
Monthly	**$50**	**$100**	**$150**
Quarterly	**$150**	**$300**	**$450**
Semi-Annually	**$300**	**$600**	**$900**